

# Roadcases and Racks

Last Modified on 17/04/2026 9:39 am EDT

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## Racks and Roadcases Defined

### When Should I use a Roadcase?

- Use a road case when you have a barcoded container that items can be scanned and placed into, prior to the road case being scanned and loaded onto the truck for shipping; items can easily be removed from the road case to be rented as single items if need be.


### When Should I use a Rack?


- Use a rack when you have individually barcoded items that will be bolted or physically attached together on a permanent/semi-permanent basis; these items cannot easily be detached and rented separately.

## How are Racks different from Roadcases?

- The key difference between a road case and a rack in RentalPoint is that items packed into a rack are temporarily removed from stock and are not individually tracked for availability, as they are treated as part of the rack.

## Setting up a Rack

 Before setting up your first rack, please ensure [Operational Parameter 102](#)

102. Racks Have Components 

### Racks Have Components ×

**YES** : Add components to the rack product in product setup then pack assets to correspond to those components OR

**NO** : Do not enter components and simply pack the rack. Any item packed in the rack will be added as a part of the rack when it is added OR



**Unpacked components/accessories** : Items packed are part of the rack but the rack may also have components/accessories that are not packed that will be sent along with the rack. These remain in loose stock and must be scanned separately at checkout

Racks Have Components?


Yes

No

Unpacked components and accessories

and [Operational Parameter 103](#) are correctly set for how your company uses racks.

103. Racks are Mobile storerooms or Boxes A rack is a box with things bol 

# 1. Create a Rack Product

The first step in setting up a rack is to create a product and set the Shipping configuration to 'Is a Rack'. The option to Track Asset Movements must also be enabled as racks are uniquely barcoded items.

The screenshot shows the 'Edit Product Record : LED Rack' interface. The 'General' tab is active, displaying fields for Product Code (LRACK), Description (LED Rack), Model No., Color, Qty Owned (3), Country of Origin, Revenue Code, Default Accessory Discount (0.00), Average Kwh usage (0.000), and Non-tracked Barcode. On the right, the 'Product Options' section has 'Barcode Track' checked and highlighted with an orange box. Below it, the 'Shipping' section has 'Is a rack' selected with a radio button, also highlighted with an orange box.

# 2. Create the Rack Asset

Each rack is tracked using a unique barcode. You'll need to create an asset for the newly created rack product. To do this, expand the rack product in the tree, highlight the **Assets** folder and click **New**.

The screenshot shows a tree view of the product 'LRACK - LED Rack'. The 'Assets' folder is expanded and highlighted with an orange arrow. Below it, four asset entries are listed: LRACK\_1, LRACK\_2, LRACK\_3, and LRACK\_4, each with a unique barcode and region. On the right, a context menu is open with the 'New' button highlighted by an orange arrow.

Complete asset information and save.

Edit Asset Record

General Service Information Financial Details Notes

Barcode LL1

Description LED Rack

Model Number

Stock Number 1

Serial Number ID # 418

Vendor

PO Number 0

Bin Location PC Code

Quantity 0 Navision Code

(Note: RFID tags should be longer than 15 characters)

Home Location Region 0 - EAST Location 0 - Toronto

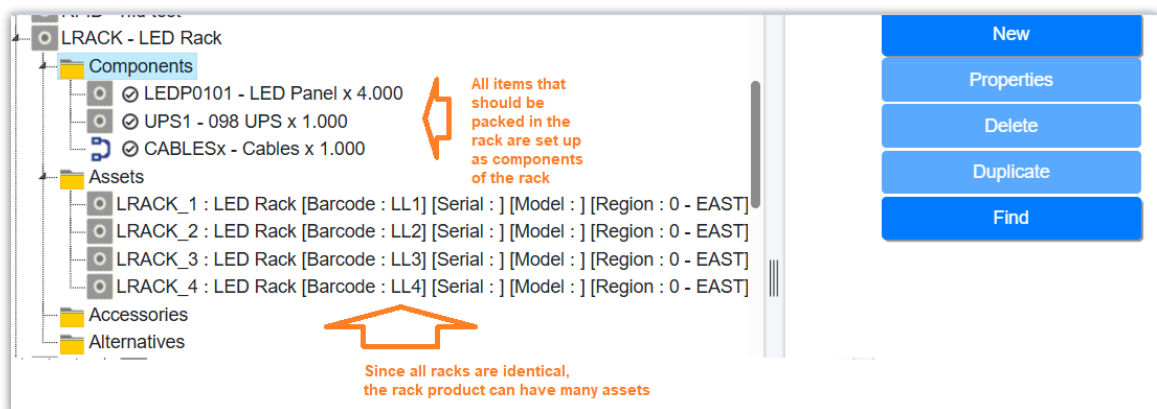
Warehouse Location Region 0 - EAST Location 0 - Toronto

✓ ✗

### 3. Determine the products Included in the Rack

This will depend on your chosen setting for Operational parameter 102 explained in Rack Parameters & Settings above.

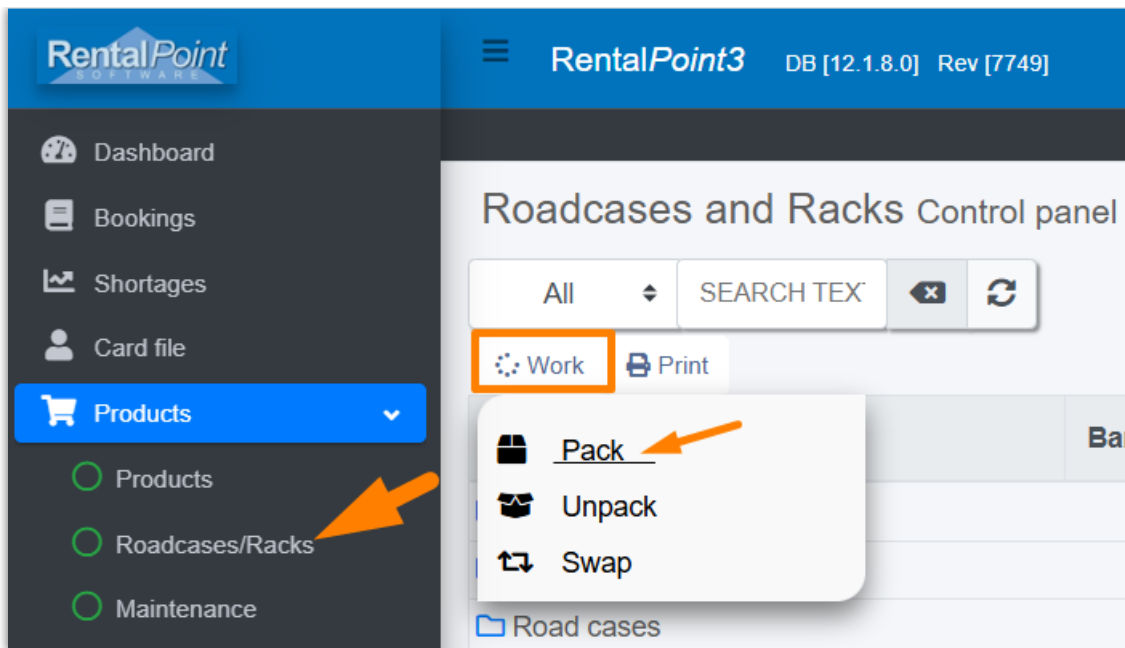
- If Operational #102 is set to 'Racks have components NO', then you're finished setting up your rack!
- Rack Components
  - If Operational #102 is set to 'Racks have components YES', then you'll need to add your rack components in Inventory Setup so that you can pack only those items when packing the rack.
  -



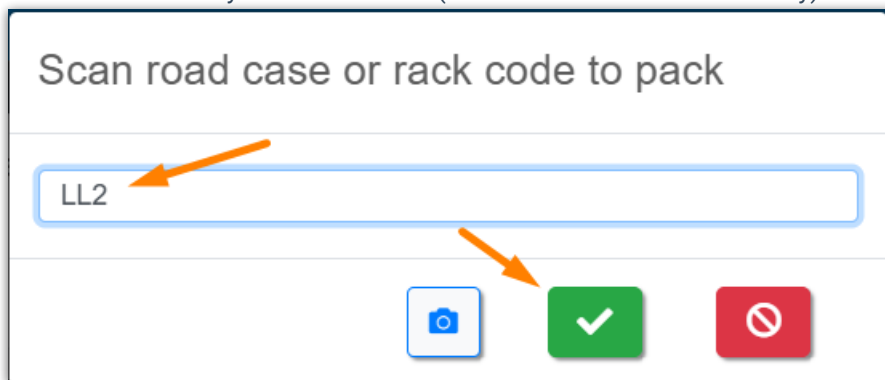
- If Operational #102 is set to 'Racks have components UNPACKED components and accessories', then you'll need to add only the components that are NOT packed into the rack, but should be included in the rental as individual items.
- Your rack is now ready to be packed!

## Packing a Rack

To pack a rack, use the pack option on the Roadcases/Racks menu



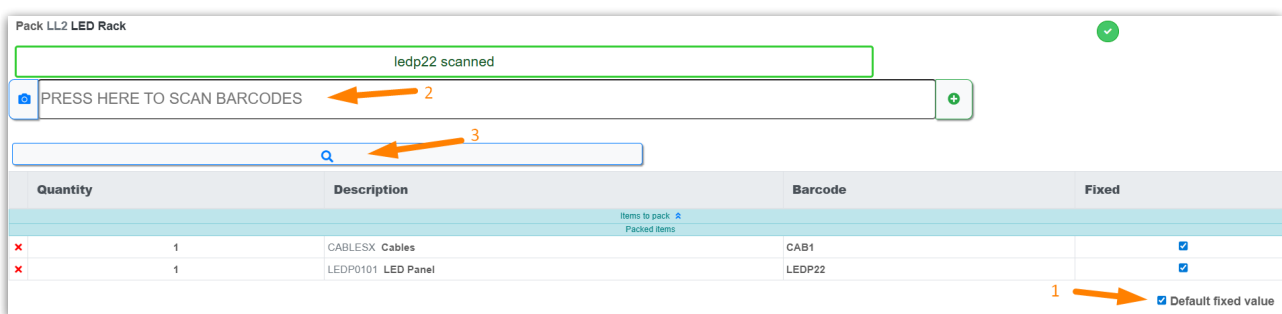
Then enter or scan your rack barcode (the rack MUST exist in inventory)



See Fig 1.2 below:

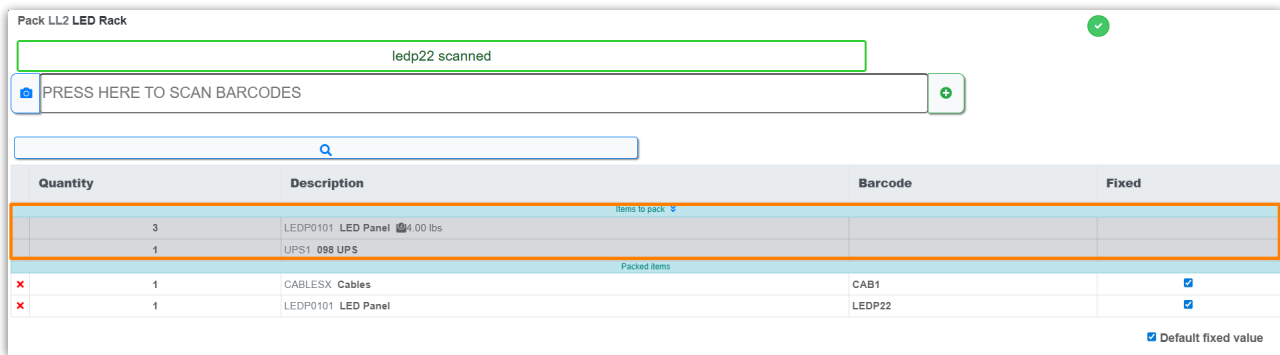
1. Check/uncheck 'Default fixed value' so that the items are scanned floating or fixed (see rack parameters and preferences for more information on this option)
2. Enter/Scan the items to be packed into the rack
3. Use the search icon to search for non tracked items (i.e. items without a barcode)

Fig 1.2

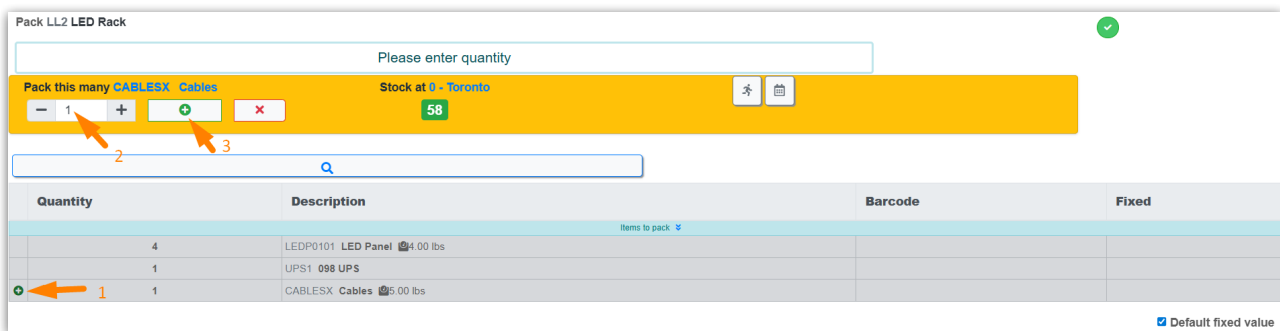


## Packing a Rack with predefined Components

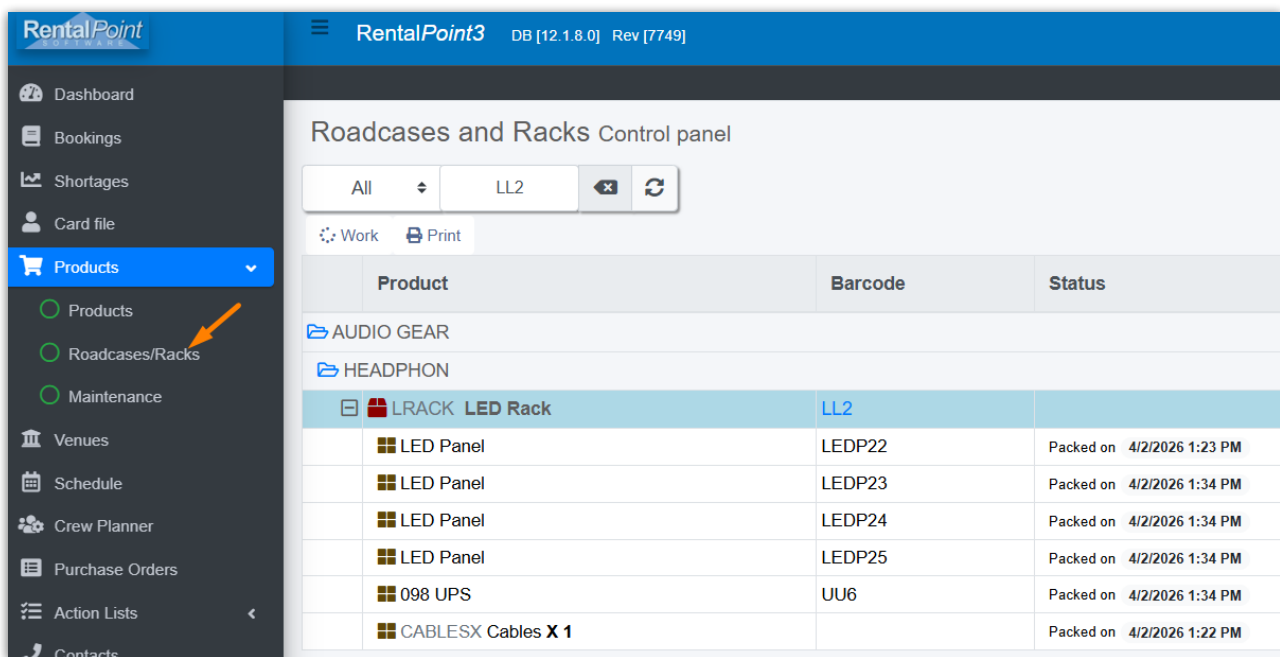
- When your rack is set to have components via Operational Parameter #102, the components and accessories display in the Pack a Rack window. This allows the user to see the entire list of items that go with the rack; both the items attached to it and the loose items sent along with it. As the items are packed they are removed from the 'items to pack' section.



To pack an untracked item, click the icon to the left of the item, enter the quantity to pack, then click the plus icon.



The packed rack displays in the Roadcases and Racks Control Panel



## Packing a Rack into a Road Case

With Operational Parameter #207 'Allow nested road cases' enabled, road cases and racks can be packed into other road cases.

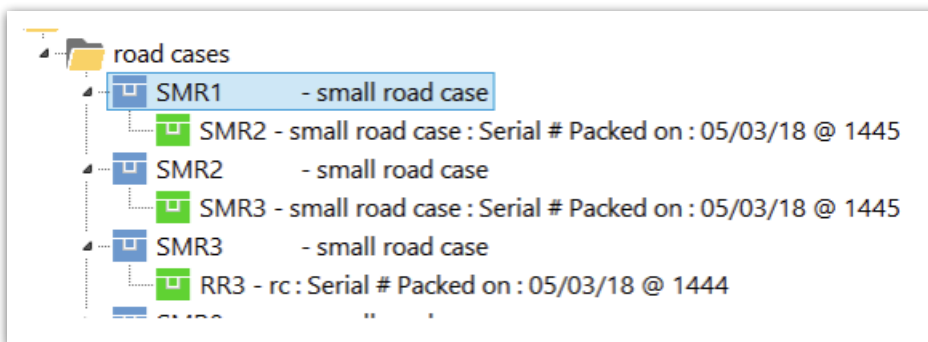
### 207. Allow nested road cases



The steps for setup and packing include:

1. Create Road case product and road case asset. (similar to setting up a rack above)
2. Create Rack product and rack asset (see setting up a rack above)
3. Pack the Rack (See packing a rack above)
4. When Packing your RoadCase, scan the RACK barcode to pack the rack into the roadcase

In the example below, a road case RR3 is packed into the road case SMR3, this in turn is packed into SMR2 and that into SMR1.



In checkout or return, when the SMR1 barcode is scanned, any fixed items from SMR1, SMR2, SMR3 and RR3 will be loaded.



While a rack may be packed into a road case, a rack cannot be directly packed into another rack.

## Packing Racks with Multi-location Inventory

Relevant only to users with a multi-location RentalPoint license.

**Asset Warehouse Location:** The last warehouse location the asset was checked in/out from

**Asset Home Location:** Where the asset generally resides (asset ownership)

Edit Asset Record

General      Service Information      Financial Details      Notes

Barcode: LL2

Description: LED Rack

Model Number: [ ]

Stock Number: 2

Serial Number: [ ] ID #: 419

Vendor: [ ]

PO Number: 0

Bin Location: [ ] PC Code: [ ]

Quantity: 0 Navigation Code: [ ]

(Note: RFID tags should be longer than 15 characters)

Home Location: Region: 0 - EAST Location: 0 - Toronto

Warehouse Location: Region: 0 - EAST Location: 0 - Toronto

[✓] [✗]

### Rack Warehouse Location

When packing a rack, where the rack warehouse location differs from the users current location, the user will be provided an option to:

1. Move the rack to the current location
2. Pack anyway
3. Move the rack asset to the current location (i.e. change the rack warehouse location to the users current location)

I13 This rack is from "Toronto" but the current location is "Kingston"

Should the user choose to 'Do nothing-Continue', then the Rack Warehouse Location is used as the correct location for all assets to be packed into the rack. Any assets with a different warehouse location will be flagged in error.

Pack LL3 LED Rack

Wrong asset Location 2 - Kingston. ledp14

PRESS HERE TO SCAN BARCODES

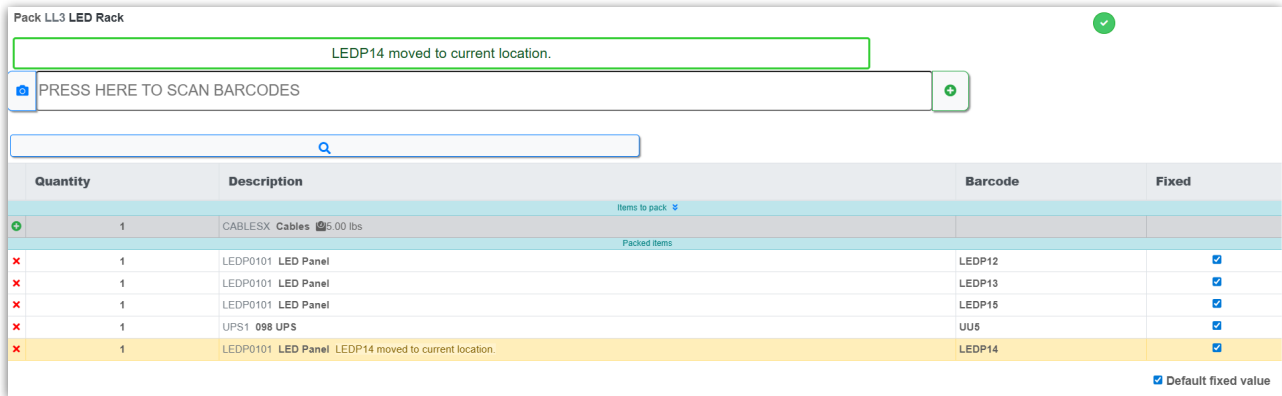
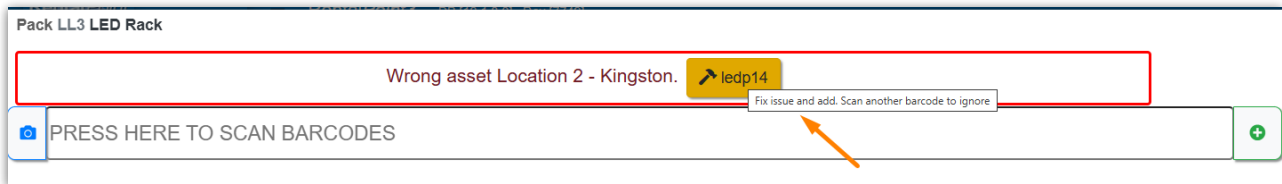
Quantity	Description	Barcode	Fixed
Items to pack			
1	LEDP0101 LED Panel 4.00 lbs		
1	CABLESX Cables 5.00 lbs		
Packed items			
✗	LEDP0101 LED Panel	LEDP12	<input checked="" type="checkbox"/>
✗	LEDP0101 LED Panel	LEDP13	<input checked="" type="checkbox"/>
✗	LEDP0101 LED Panel	LEDP15	<input checked="" type="checkbox"/>
✗	UPS1 088 UPS	UU5	<input checked="" type="checkbox"/>

Default fixed value

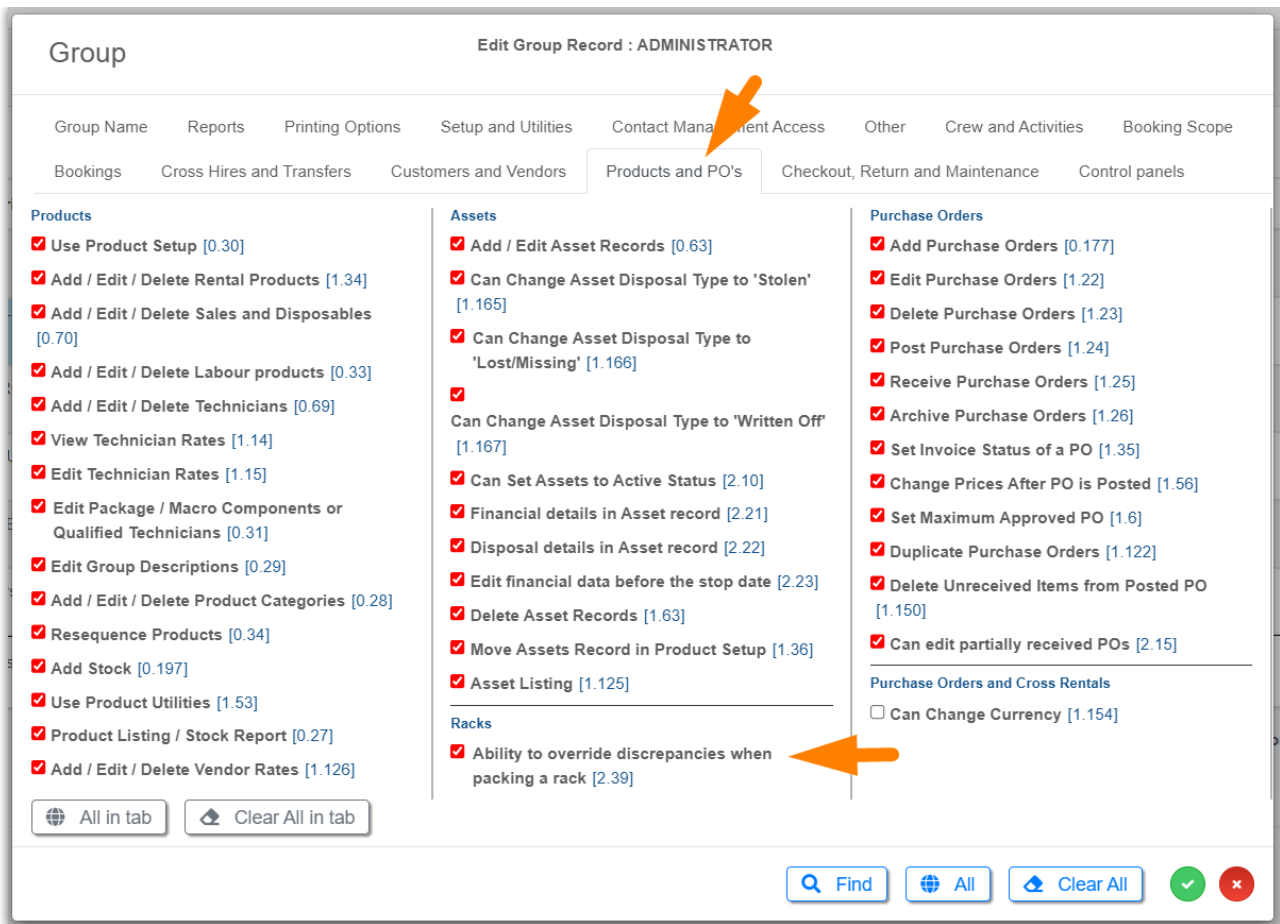
### Asset/Barcode Tracked Items with a different warehouse location to the rack

While packing a rack, if scanned assets have a different warehouse location to the rack asset, the user will be given an option to fix the error on save.

Where the user chooses to 'scan another barcode to ignore', the 'wrong asset location' asset will NOT be packed into the rack



User needs 'ability to override discrepancies when packing a rack' operator privilege



## Non Barcode Tracked Items

When a non barcode tracked item is scanned, the item count is deducted from the stock of the 'rack assets' warehouse location. So even if you have a different location scope selected, the items will assume the SAME warehouse location as the rack. The non-tracked product below has a total count of 60 items in Toronto, 4 are packed in racks, leaving 56 items for individual rental.

Fig 1.4


#	Location Name	Quantity	Bin Location	In Racks	Loose Stock
0	Toronto	60		4	56
1	Calgary	55		0	55
2	Kingston	55		0	55
3	Edmonton	55		0	55
4	Lake Louise	55		0	55
5	Ottawa	0		0	0


Note : The "In Rack" column displays the number of items packed into a rack, "Loose Stock" is the remaining items available (Total Stock - Rack Items).

## Addressing Packing Errors

Some assets may have errors or warnings that should be resolved before packing can be completed. Enabling the 'Ability to override discrepancies when packing a rack' operator privilege, will allow the user an option to resolve discrepancies during the packing process. Any errors or warnings that can be resolved will be listed once the user attempts to save the packed rack.

## Availability & Inventory Packed in Racks

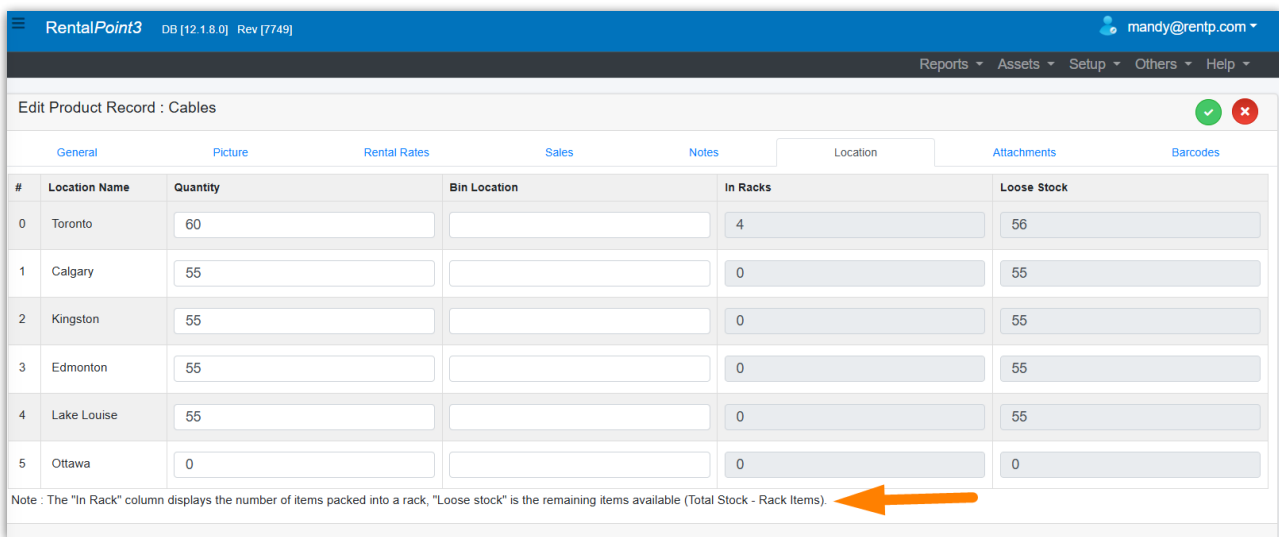
 When packed into the rack, the item is removed from general stock and is not available to be rented separately, even when sitting in the warehouse.

 See information on Barcode #43 in Parameters section for Availability for Packed/UnPacked racks

## Non Barcode Tracked Inventory

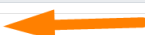
Identified as packed in racks in Inventory Setup

[Click Location tab on Multi-Location system](#)



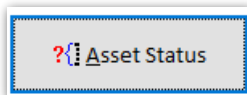
The screenshot shows the 'Edit Product Record : Cables' window in RentalPoint3. The table below represents the data shown in the 'Location' tab.

#	Location Name	Quantity	Bin Location	In Racks	Loose Stock
0	Toronto	60		4	56
1	Calgary	55		0	55
2	Kingston	55		0	55
3	Edmonton	55		0	55
4	Lake Louise	55		0	55
5	Ottawa	0		0	0

Note: The "In Rack" column displays the number of items packed into a rack, "Loose stock" is the remaining items available (Total Stock - Rack Items). 

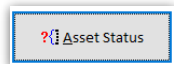
## Assets/Barcode Tracked Inventory

When a product is barcode tracked, the



button will display in the Availability Calendar Window.

While the availability calendar shows the availability count only for items NOT packed in racks, clicking



will show the breakdown of assets under the product including those packed in racks.

### Asset Status

Available via right click Product Menu



- BLACK - black chairs
- WHITE - white chairs
- TEALT - Teal chairs
- CLOCK - wall clock
- RFID - rfid test
- LRACK - LED Rack
- LEDP0101 - LED Panel

Components

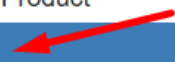
Assets

- LEDP0101
- LEDP0102
- LEDP0103
- LEDP0104
- LEDP0105
- LEDP0106
- LEDP0107
- LEDP0108

- Find Products
- Setup Products
- View
- Work
- Product
- Maintenance
- Admin
- Reports

- LEDP1] [Serial : 93820-982983AA] [Model : ]
- LEDP2] [Serial : ] [Model : ] [Region : 0 - EAS
- LEDP3] [Serial : ] [Model : ] [Region : 0 - EAS
- LEDP4] [Serial : ] [Model : ] [Region : 0 - EAS
- LEDP5] [Serial : ] [Model : ] [Region : 0 - EAS
- LEDP6] [Serial : ] [Model : ] [Region : 0 - EAS
- LEDP7] [Serial : ] [Model : ] [Region : 0 - EAS
- LEDP8] [Serial : ] [Model : ] [Region : 0 - EAS

- Add Stock
- Show Parent Product
- Asset Status
- Asset Movements



### Assets for LED Panel ✕

Status Totals Consolidated

Active Find code [Icons]

Code	Description	Status	Due Back	Serial No.	Bin	Location
LEDP1	LED Panel	In Warehouse [ In a rack ]		93820-982983AA		Toronto
LEDP2	LED Panel	In Warehouse [ In a rack ]				Toronto
LEDP3	LED Panel	In Warehouse [ In a rack ]				Toronto
LEDP4	LED Panel	In Warehouse [ In a rack ]				Toronto
LEDP5	LED Panel	In Warehouse [ In a rack ]				Toronto
LEDP6	LED Panel	In Warehouse [ In a rack ]				Toronto
LEDP7	LED Panel	In Warehouse [ In a rack ]				Toronto
LEDP8	LED Panel	Out on booking : MRCI00016	23/07/19 @ 1900			Toronto
LEDP9	LED Panel	Out on booking : MRCI00016	23/07/19 @ 1900			Toronto
LEDP10	LED Panel	Out on booking : MRCI00016	23/07/19 @ 1900			Toronto
LEDP11	LED Panel	In Warehouse				Toronto
LEDP12	LED Panel	In Warehouse [ In a rack ]				Toronto
LEDP13	LED Panel	In Warehouse [ In a rack ]				Toronto
LEDP14	LED Panel	In Warehouse [ In a rack ]				Toronto
LEDP15	LED Panel	In Warehouse [ In a rack ]				Toronto

EAST Toronto

and from the Equipment Grid of the booking via Status button

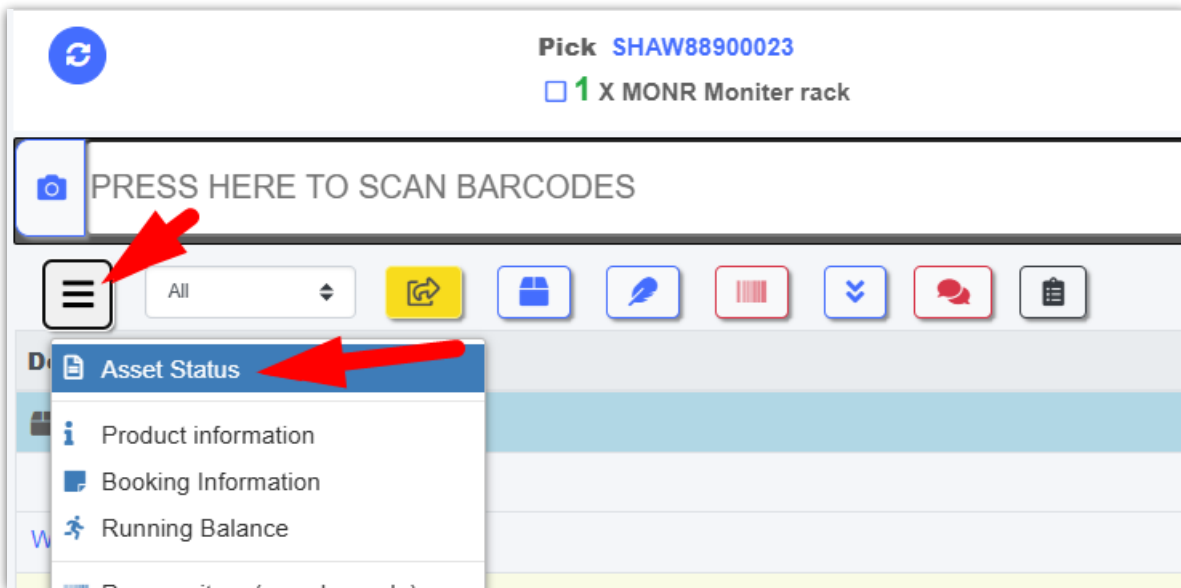
SHAW88900007 0 - EAST 0 - Toronto

WH Out: 2026/

Find Work View Change Arrange

- Product information
- Parent products
- Asset Status

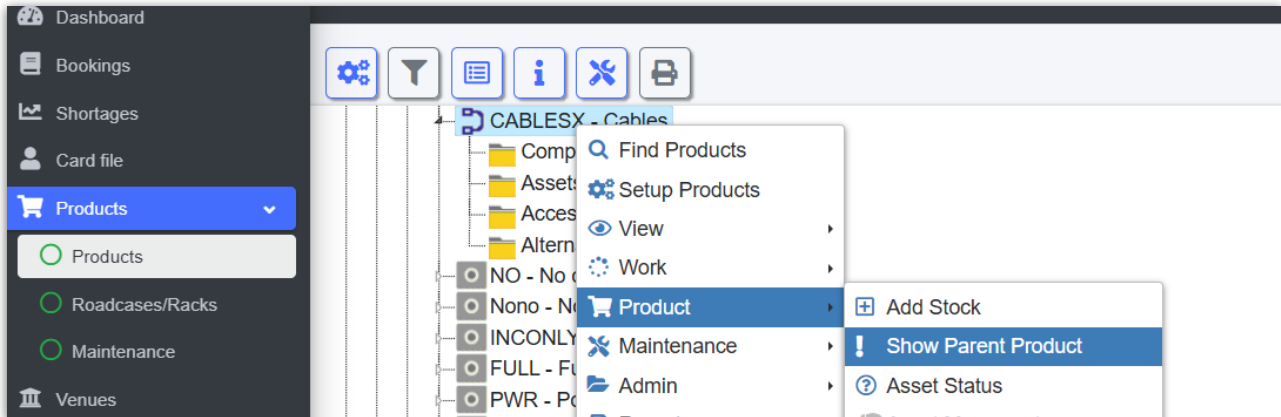
and from the checkout window **Asset Status** button



## Show Parent Product option

Use Show Parent Product to identify racks your product is packed into

Accessible from Products Menu

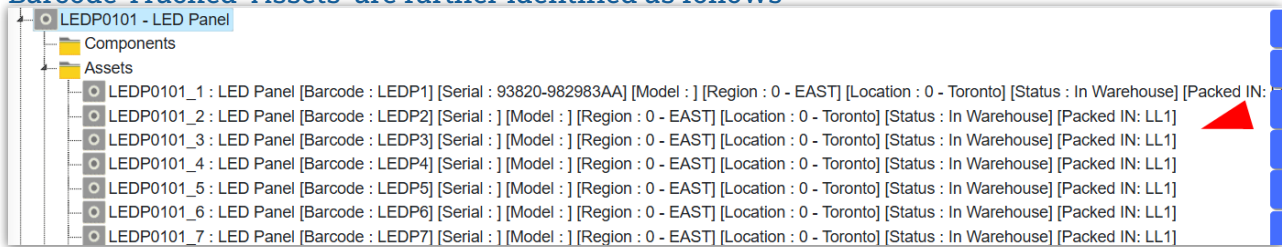


Product : **CABLESX - Cables**

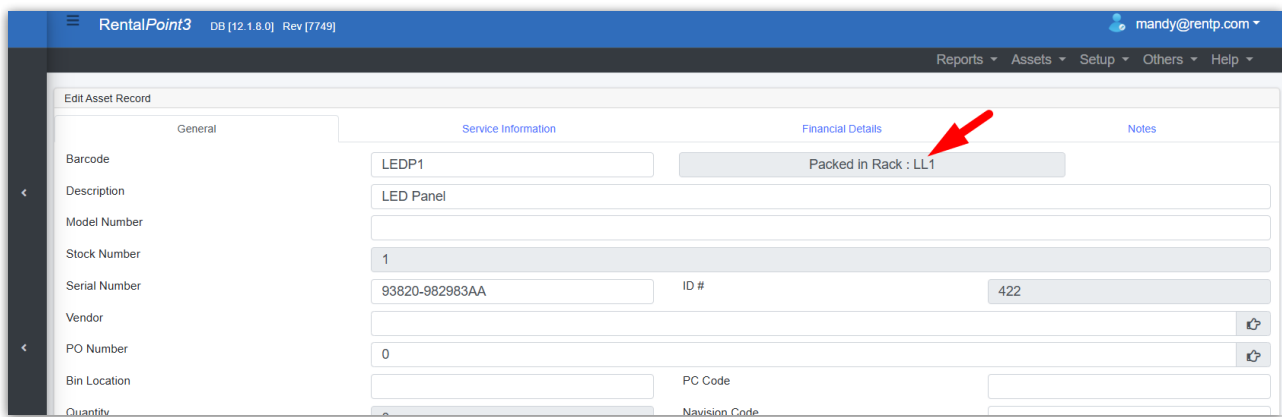
Parent Code	Asset Description	Parent type	Quantity	Type / Barcode	Barcode packed
CABLESX belongs to these packages or parent products					
P10066	Sonifex 24 way mono DA	Single Item	1.00	Optional Component	
MYRACK		Single Item	2.00	Component	
MONITOR	Monitor 25"	Single Item	1.00	Component	
P10023X	CardFrame	Single Item	1.00	Component	
KEURIG	KEURIG Single CUP Coffee Maker	Single Item	1.00	Component	
LIGHT123	Lighting	Single Item	1.00	Component	
MIC	microphone	Single Item	1.00	Component	
MIC1	Standard Microphone	Single Item	1.00	Component	
MIC2	E series Microphone	Single Item	1.00	Component	
LRACK	LED Rack	Single Item	1.00	Component	
ACASE	Audio Roadcase	Single Item	10.00	Component	
P10034	Dual Source 5 Out Audio DA	Single Item	1.00	Component	
CABLESX is packed as a non barcode tracked product					
MYRACK	Rack	Rack	2	MYRACK2	CAB1 - non asset tracked product
LRACK	LED Rack	Rack	1	LL2	CAB1 - non asset tracked product
LRACK	LED Rack	Rack	1	LL3	CAB1 - non asset tracked product
Quantity in Locations					

# Inventory Setup and Items Packed in Racks

Barcode Tracked 'Assets' are further identified as follows



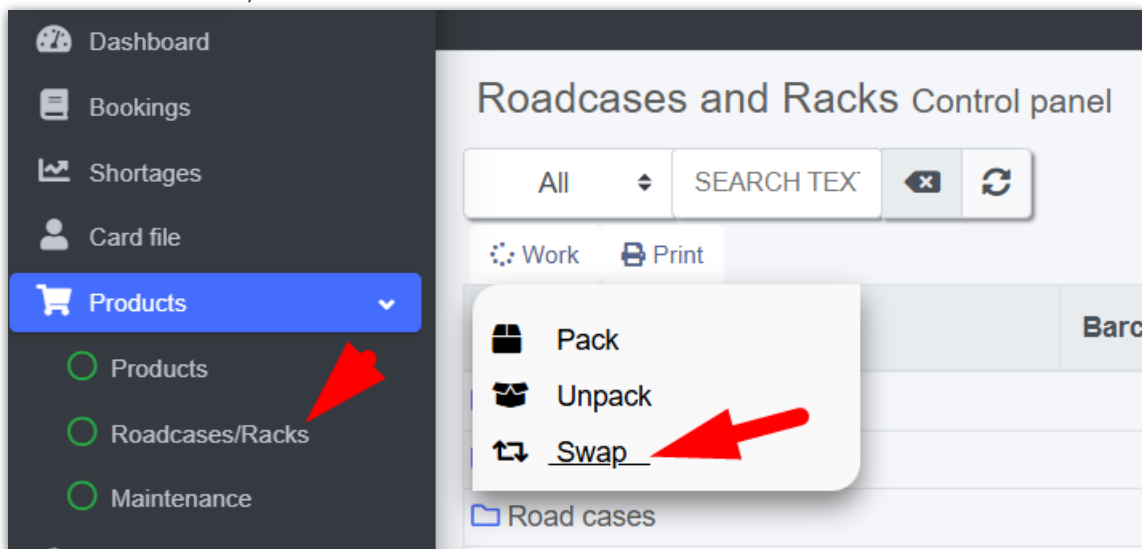
Edit asset record also identifies the asset as packed into a rack



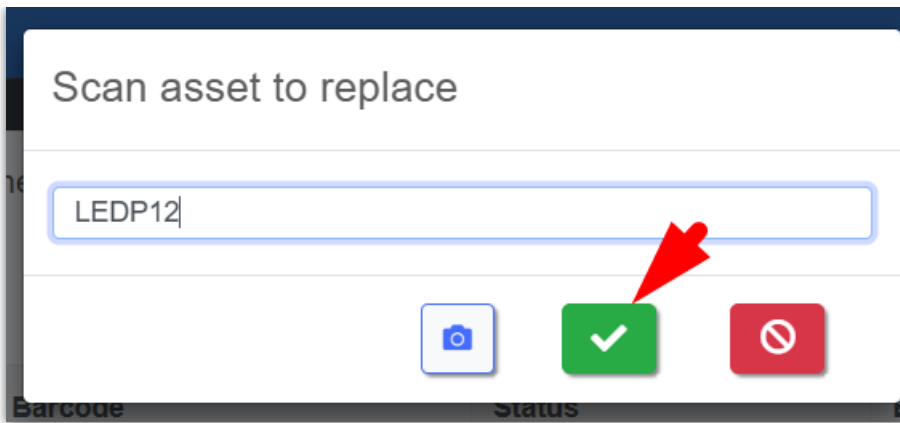
## Swap out Damaged Rack Items

If an item in a rack or road case needs to be swapped with another due to fault or damage, use the swap option on the Roadcases and Racks tab. This option can be used even if the rack is checked out to a booking

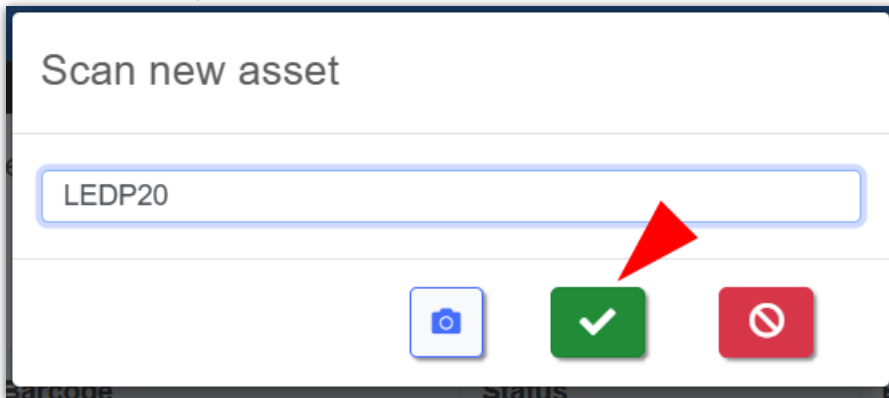
1. From Products Menu, click Roadcases and Racks



2. Enter the rack asset to swap out



3. Then scan the replacement asset



4.

Roadcases and Racks Control panel

All LEDP20

Work Print

Product	Barcode	Status
Out on SHAW88900023 Shaw County 4/30/2026 @ 08:00 to 5/1/2026 @ 17:00		
LRACK LED Rack	LL3	
LED Panel	LEDP13	Packed on 4/2/2026 1:54 PM
LED Panel	LEDP14	Packed on 4/2/2026 1:57 PM
LED Panel	LEDP15	Packed on 4/2/2026 1:54 PM
LED Panel	LEDP20	Packed on 4/13/2026 3:20 PM
098 UPS	UU5	Packed on 4/2/2026 1:54 PM
CABLESX Cables X 1		Packed on 4/2/2026 2:58 PM

swap when the asset is currently out.

## Rack items in Maintenance

Entering maintenance for an item within a rack won't affect the items availability. Unpack the item from the rack if you want to **send it out for maintenance**, or schedule maintenance on the rack item to indicate that the entire rack will be out of service for the time period.

## Racks on Custom Templates

When printing custom templates, you can use the &EXRACKIC& insert field to stop racked items from printing.

Things to keep in mind:

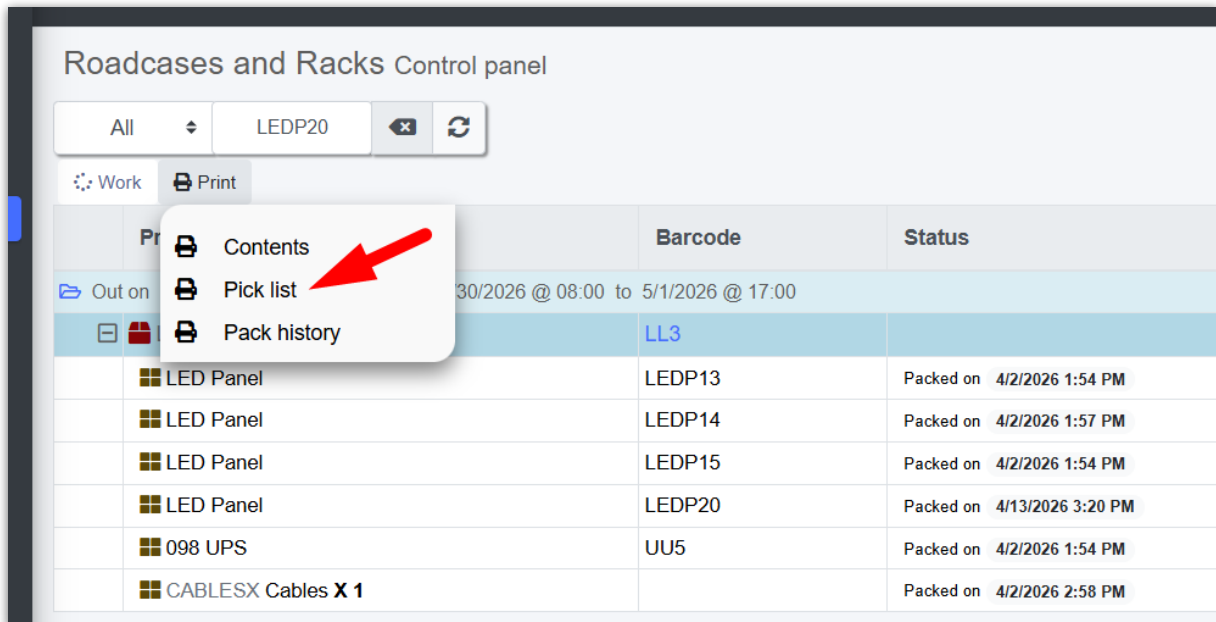
- If you are already excluding parts on your template this field may not be necessary.
- Racked items will continue to print if the racked item is an accessory and the accessory has a price. This ensures that all values included in the total amounts are displayed.
- The consolidated booking hardcopy report does not include racked items to ensure that items that are already packed in a rack are not picked from loose stock.
- Operational #60, #61, #62 and #63 also determine if racked items display on printouts. These global overrides will override the product properties and any special insert fields.

## Print Rack Picklist

A pick list for a road case or rack, lists the items that were previously packed into it. The pick list is the last complete pack list.

To print the pick list for a road case or rack, use one of the options below:

- Highlight the rack in the Roadcases and Racks tree, then click the print button
- 

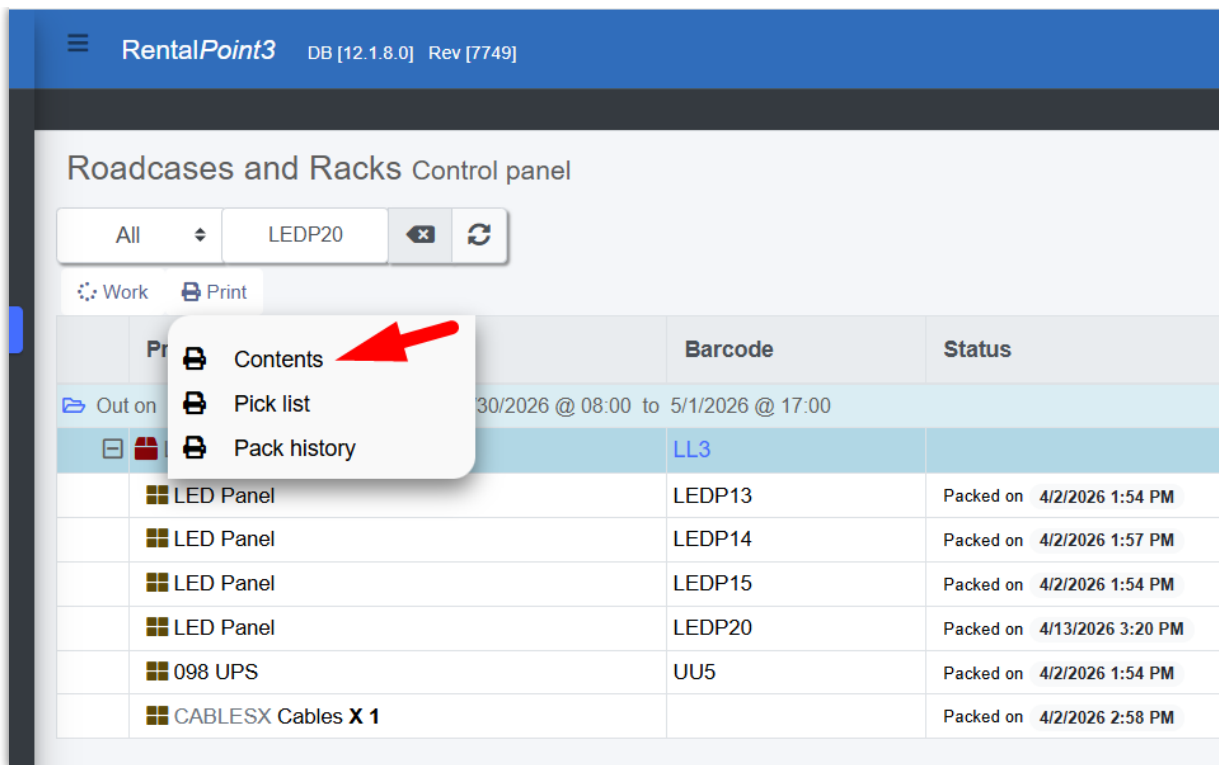


- 

## Print Rack Contents

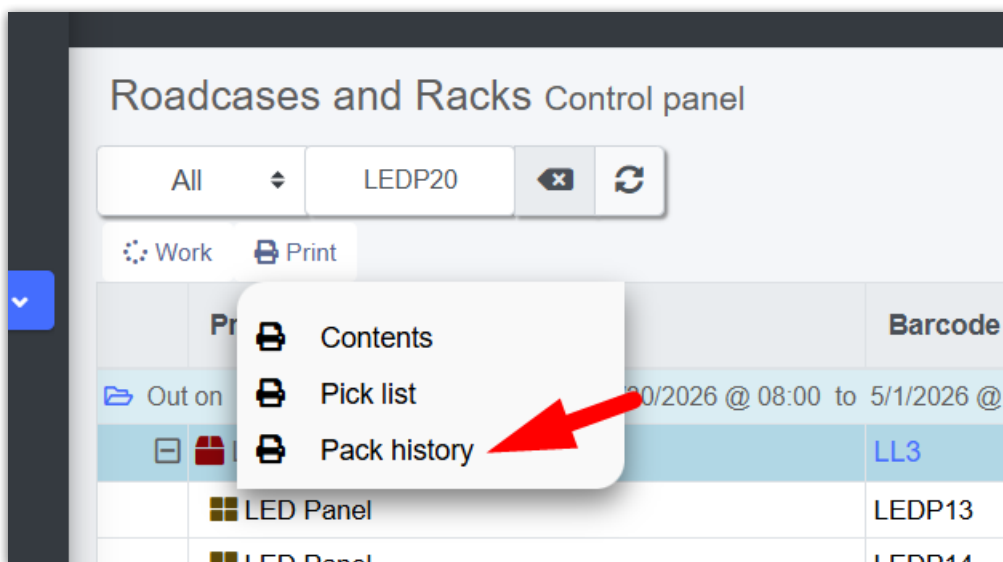
Contents should be what's packed currently, to print the contents of a road case or rack, use one of the options below:

- Highlight the rack in the Roadcases and Racks tree, then click the  button
-



## Print Pack History


The pack list gets reset after you completely unpack the roadcase/rack and then repack. The first time the new pack list is entered the old one gets moved to history.

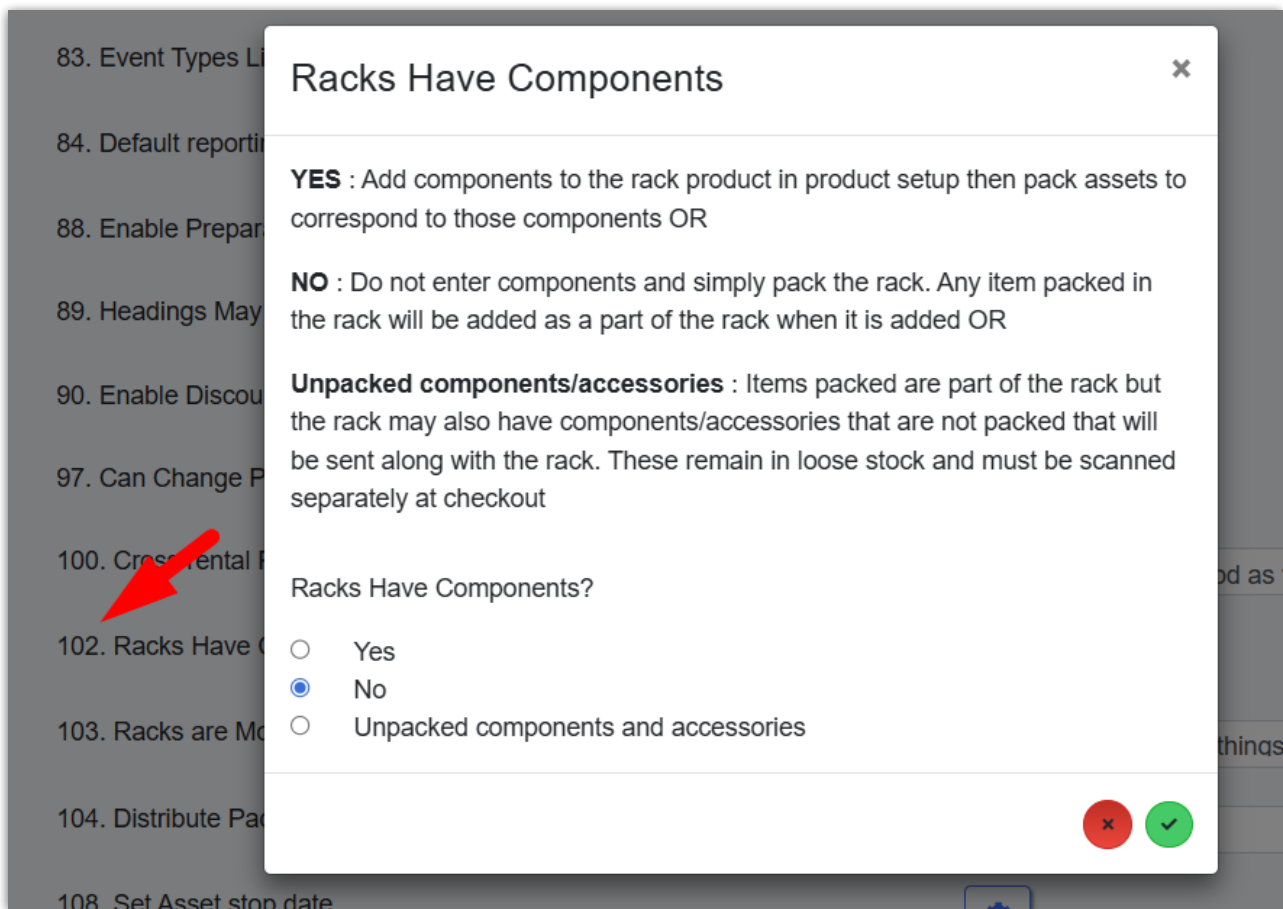


## Rack Parameters & Settings

### Racks have components Yes/No (Operational Parameter #102)

There are three options for determining how racks use components. Choose the option that best suits your rack use, then go to setup-->parameters-->operational-->102 to set your option:

 Option 3 is provided as a legacy to those companies that have racks already set up in this manner, and wish to continue. **Option 1 is recommended for new users.**



### Option 1: Racks have components: NO **\*\*Recommended\*\***

In this scenario, component and accessory folders within a rack product are hidden in the Inventory Setup Product Tree (F10). The rack parts are simply defined by what is packed into the rack.

#### This option functions as follows:

1. The component and accessory folders are hidden from the product tree.
2. Only items packed in the rack are loaded into the booking equipment list.
3. All items packed into the rack are listed on a booking as 'In Rack'.
4. Items packed into the rack are removed from loose stock.

#### Initial Setup

1. All items that are part of the rack need to be created separately in F10.
2. Use the Pack a Rack window to scan the components into the rack. Packing an item in a rack removes the item from loose stock.
3. A rack must be packed before it's added to a booking.

### Option 2: Racks have components: UNPACKED components and accessories

Option 2 allows components or accessories to be defined, that are NOT part of the PACKED rack but may be shipped with it.

This option functions as follows:

1. The component and accessory folders are visible in the Inventory Setup Product Tree (F10). Components and accessories should be added ONLY if they are NOT getting packed into the rack
2. Items packed into the rack are removed from loose stock. The rack should be packed before adding it to a booking.
3. When the rack is added to a booking & subsequently checked out:
  - Components and Accessories are loaded on the booking with normal availability (not 'In Rack') following the packed items and are not removed from loose stock. These items must be scanned at checkout like any other non-rack item.
  - All items packed into the rack are listed on a booking as 'In Rack'. Simply scan the rack barcode out at checkout.

### Option 3: Racks have components: YES

In this scenario, all items that are part of a rack are first defined as components in the Inventory Setup Product Tree (F10). After the items are configured as components of the rack, the items need to be scanned into the rack with the Pack a Rack utility.

**This option functions as follows:**

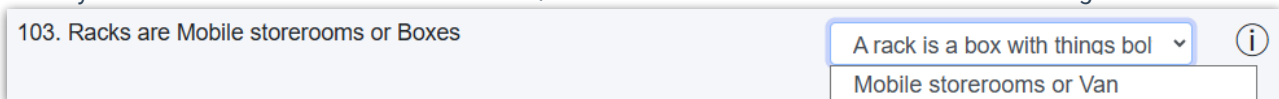
1. Components of racks are listed on a booking as 'In Rack'.
2. Items packed into the rack are removed from loose stock.
3. Items packed into the rack should match the component list in Inventory Setup (F10).

### Initial Setup

1. All items that are part of the rack need to be created separately in Inventory Setup (F10).
2. Using drag & drop, **add the items to the components folder** of the rack.
3. Use the Pack a Rack window to scan the components into the rack. Packing an item in a rack removes the item from loose stock.
4. The list of components must match the list of assets packed into the rack, if there are more components than items packed in the rack then the line item will show a shortage in the equipment grid of the booking.

## Mobile Storerooms (Operational Parameter #103)

Usually a rack is a box or unit with items bolted/attached to it. This is the recommended setting.



However, when Operational Parameter #103 is set to 'Mobile storerooms or Van', availability can be tracked for the items inside the rack separate from the rack asset itself. All items that are part of a rack display as short (in red) if the rack product is short.

## Allow Nested Road Cases (ability to pack a rack into a road case)

With Operational Parameter #207 'Allow nested road cases' enabled, road cases and racks can be packed into

other road cases.

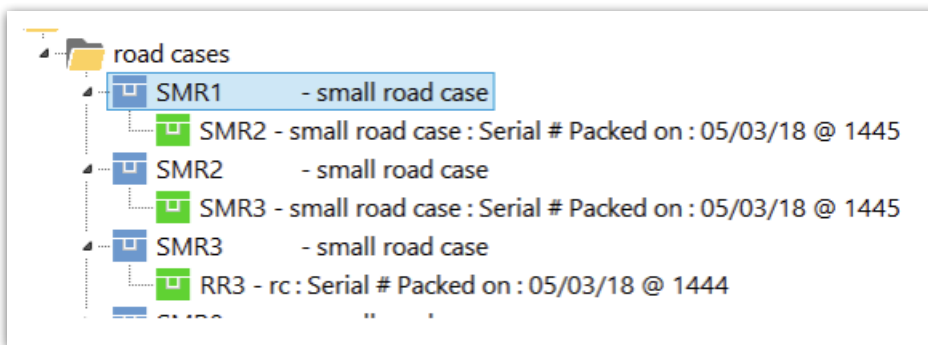
## 207. Allow nested road cases



The steps for setup and packing include:

1. Create Road case product and road case asset. (similar to setting up a rack above)
2. Create Rack product and rack asset (see setting up a rack above)
3. Pack the Rack (See packing a rack above)
4. When Packing your RoadCase, scan the RACK barcode to pack the rack into the roadcase

In the example below, a road case RR3 is packed into the road case SMR3, this in turn is packed into SMR2 and that into SMR1.



In checkout or return, when the SMR1 barcode is scanned, any fixed items from SMR1, SMR2, SMR3 and RR3 will be loaded.



While a rack may be packed into a road case, a rack cannot be packed directly into another rack.

## Floating v Fixed Rack Items

Rack items can now either be physically bolted to the rack 'Fixed' or sent along with the rack 'Floating'.

1. Fixed items are automatically scanned in the checkout window and return window when the rack barcode is scanned, while floating items must be scanned individually.
2. Floating items are still part of the rack, they are removed from loose stock and display as 'In Rack' in the booking.
3. Barcode Parameter #41 'Scan floating rack items on return only'
  - When set to NO, floating items must be individually scanned both in the checkout and return window
  - When set to YES, floating items are automatically scanned out when the rack is scanned out, however all floating items must be individually scanned on return

In Fig 1.1 below:

- Items are defined as floating in the pack window by unchecking the Fixed column.
- The 'Default Fixed Value' checkbox option, allows any new items scanned to default to either 'fixed' or

'floating'

Pack LL3 LED Rack

PRESS HERE TO SCAN BARCODES

Quantity Description Barcode Fixed

Quantity	Description	Barcode	Fixed
1	CABLESX Cables	CAB1	<input checked="" type="checkbox"/>
1	LEDP0101 LED Panel	LEDP13	<input checked="" type="checkbox"/>
1	LEDP0101 LED Panel	LEDP14	<input checked="" type="checkbox"/>
1	LEDP0101 LED Panel	LEDP15	<input checked="" type="checkbox"/>
1	LEDP0101 LED Panel	LEDP20	<input checked="" type="checkbox"/>
1	UPS1 098 UPS	UUS	<input checked="" type="checkbox"/>

Default fixed value

## An important note on use of Rack quantities

### One Product and Asset Combination Per Unique Rack

- Since all racks can be packed differently, each unique Rack Product MUST have ONE asset only in inventory setup. Each UNIQUE Rack Product would then be packed uniquely and used individually on the equipment grid of the booking.

### One Product with multiple assets used only for IDENTICALLY packed racks

- If there is a need for a Rack Quantity of greater than one (eg. 2 or more of the identical items are booked on a job where both are individually packed racks); Then all Racks packed for that product should be identical in content.

## Availability for Empty/UnPacked Racks

Enable barcode parameter #43 so that empty (i.e. unpacked) racks will not show as available for rental.

43. Racks are unavailable until packed



### Racks are unavailable until packed

Racks won't count towards stock until they are packed and when unpacked will reduce the stock quantity again.

Racks unavailable until packed?

- Yes  
 No

